

# Introduction to **Adobe Acrobat Professional** version X

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[oit.wvu.edu/training/classmat/acr/](http://oit.wvu.edu/training/classmat/acr/)

*This workshop will teach you how to create and enhance Portable Document Format (PDF) files using Adobe Acrobat software.*

*Acrobat PDF files are often used as an alternative to HTML to display content and forms on the web. Publishers use PDF files as page proofs for authors*

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# Course Description

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## Introduction to Adobe Acrobat

Learn to use Adobe Acrobat software to create and enhance PDF files.

Topics:

- create a PDF file
  - print to Adobe PDF printer driver
  - use PDFMaker Macro
  - import images
  - web capture
- use navigation tools
- add and edit bookmarks
- use the TouchUp Text tool
- add hyperlinks to internal document pages, external files, and online resources
- set preferences and document properties
- resources to learn more about the software

Prerequisite: basic word processing skills

## Intermediate Adobe Acrobat

Enhance your PDF files with graphics and media.

Learn to use annotation tools and the full-text index feature.

## Adobe Acrobat Forms

How to create forms and use the Form tools in Adobe Acrobat Professional. How to create simple calculations for form text fields. How to save and reuse data from a completed form. How to validate and format the data entry at the client-side will also be covered. Prerequisite: *Introduction to Adobe Acrobat* or *ETDs at WVU*.

## Creating Accessible PDF Files

How to determine if a PDF file is accessible. How to ensure that PDF files you create, especially those from Microsoft Office documents, are accessible to all. How to use the Read Out Loud feature in Adobe Reader.

## Adobe Acrobat Workshop Web Page

[oit.wvu.edu/training/classmat/acr/](http://oit.wvu.edu/training/classmat/acr/)

# Adobe Acrobat in the Real World

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## Adobe Acrobat Software Components

### Adobe Reader

freely distributed from adobe.com, read and print PDF files

### Acrobat Standard

read, print, combine, annotate, and enhance PDF files

### Acrobat Professional

same as Standard plus create and edit forms

### Acrobat Distiller

convert PostScript files to PDF files

### Acrobat Paper Capture

convert scanned files to PDF

### Acrobat Web Capture

create a PDF version of a web site or collection of web pages.

### Acrobat Catalog

create a full-text index of a PDF collection

## Why create PDF documents?

- A PDF file will look the same on other computers and print the same on printers other than the one that was used by the author.
- Those who are reading the document do not have to have the original software used to create the file; they just need a copy of Adobe Reader.
- Adobe Acrobat PDF files are cross platform; people who are using Macintosh, Windows, or Unix computers can all view and print the same PDF files.
- Often, a PDF file can be smaller than the original document used to create it.
- Risk of virus transmission is much smaller when using PDF for document exchange via email as opposed to Microsoft Office files.
- You can embed links to multimedia such as sound files and movie clips; color pictures can be easily and cheaply included.
- If you complete a PDF form created by someone else, you can save the form for future use. You can export data from a saved form and import data to a new form.
- With the Professional version of Acrobat, you can create your own forms that look like the originals; when opened in Adobe Reader, the user can complete the form and print it out - it will then appear as if the person used a typewriter.

## ***Pre-Press***

Adobe Acrobat PDF documents are useful for those who send off their brochures, newsletters, journal articles, etc., to be printed by a professional printing company or a publisher. The printer can send you back a PDF version of what the item will look like when it is published; this method is often faster and more accurate than paper drafts or page proofs. Some printers accept PDF files as the source material for their printing.

## ***Collaborative Writing***

PDF files are a useful way to jointly edit a document. The files can be easily shared via email attachments or from a web server. Acrobat tools such as sticky notes, highlighter, and pencil can be used to add comments or call attention to items that need correction. All collaborators who want to mark up the PDF file must have a copy of the Adobe Acrobat software.

## ***Sharing information on the Internet***

PDF files are often smaller than Word, PowerPoint, or WordPerfect files which will reduce download time. Any images on the pages are embedded in that single file so several files don't have to be transferred from the web server to the web browser. You don't have to have the original software application to open the file or any special viewer other than the Adobe Reader; you are also protected from macro viruses that are sometimes embedded in Microsoft Office documents. Using the Adobe Acrobat Hyperlink tool, you can add hyperlinks to other pages in the document or to Internet URLs and email addresses. You can protect a PDF file from editing or copying.

## **Examples of PDF files used at West Virginia University**

- **Admissions Forms** for prospective students to print and complete  
[[http://adm.wvu.edu/home/downloadable\\_forms](http://adm.wvu.edu/home/downloadable_forms)]
- **Electronic Information Document Repository** [<http://wvusolar.wvu.edu/>]
  - ETD Collection: theses and dissertations at WVU
  - Honors Theses
  - Hosted conference proceedings & white papers submitted by WVU faculty
- **Extension Service publications** [<http://www.wvu.edu/~exten/infores/pubs.htm>]
- **Plant Pathology Research Articles**  
[<http://www.caf.wvu.edu/kearneysville/biggs/pubform.html>]
- **OIT Workshop Handouts** [<http://oit.wvu.edu/training/classmat/>]
- **Online Forms:**
  - Extended Learning Forms:  
[<http://online.wvu.edu/continuing/forms/>]
  - Software License Information Center (SLIC) Order Form  
[<http://oit.wvu.edu/slic/files/orderform.pdf>]
- **Faculty Syllabi** – an instructor often posts a course syllabus as a PDF file
- **University Libraries** – interlibrary loan, where allowed
  - Electronic Reserves [<http://ereserves.lib.wvu.edu/>]
- **WVU Course Catalogs** [<http://coursecatalog.wvu.edu/>]

# Different ways to create a PDF file

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Following are some of the many ways to create a PDF file:

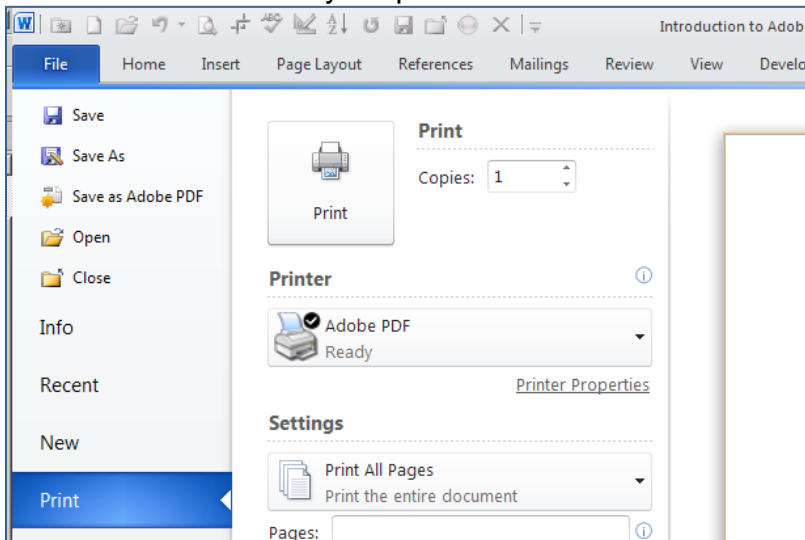
- **Print to PDF.** Your source document is converted to a PostScript file, and Acrobat Distiller converts the PostScript file to PDF. Current versions of Acrobat do this conversion for you behind the scenes.
- Use the Acrobat **PDFMaker** macro in conjunction with Microsoft Office software. Note that for Microsoft Office documents, Print to PDF does not include some of the features available in PDFMaker, such as bookmarks and hypertext links.
- Start in Acrobat and use the **File > Create PDF** command.
- **Web Capture** a web site using Adobe Acrobat 5.0 or higher.
- **Export** to PDF from other Adobe applications such InDesign or Photoshop.
- **Scan** document directly into a PDF file from Acrobat software. This file will be “graphic images”, not full searchable text, unless you subsequently use Acrobat's OCR Text Recognition command. Scanning must be done at 600dpi for optical character recognition of scanned text.
- Scan document into a an image file and import the image file into Acrobat. Create Adobe PDF Online Service: free trial (5 files) or by subscription (\$10/month). Visit [createpdf.adobe.com](http://createpdf.adobe.com) for more information.
- If you are using Office 2007 (Word, Excel, PowerPoint), you can download a free add-on (**SaveAsPDFandXPS.exe**) from microsoft.com, which allows you to save Office files as PDF without owning Adobe Acrobat software. Office 2010 has this add-on included (you don't have to download and install it).
- If you are using a Macintosh running OS X, you can print files to PDF using the **Save as PDF** button on the Print dialog. You cannot edit the PDF file without Adobe Acrobat software.
- You can convert a LaTeX file to PDF using Ghostscript and other tools. LaTeX is used on campus by engineering, physics, chemistry, math, and computer science students.
- If you are using OpenOffice software, use the File > Export to PDF command.
- You can obtain and use free or lower cost software such as CutePDF, PDF Master, or gDoc Creator to create a PDF file.

Today's workshop will focus on converting a Word document to PDF using the “Print to PDF” method and the PDFMaker Macro for Office 2010. We will also create a PDF file from a PowerPoint file and from a web page. If time permits, we will also cover converting an image to PDF.

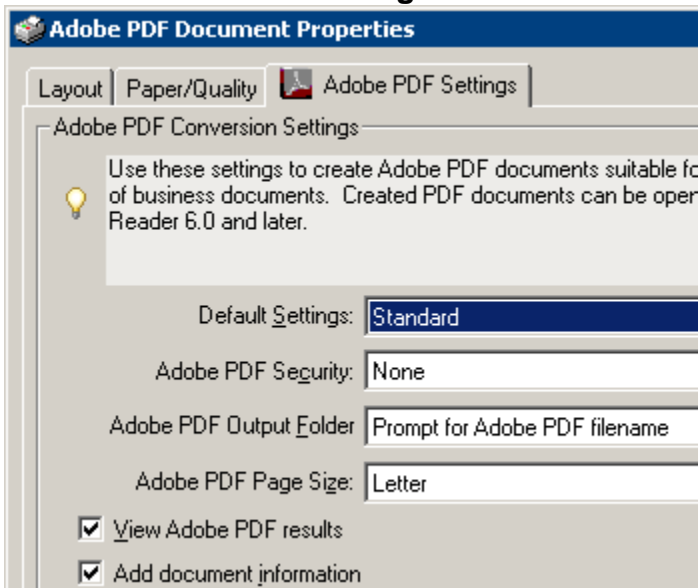
## Print to the Adobe PDF Printer Driver

In several applications, you can use the Adobe PDF printer to convert your file to a PDF.

1. Create, edit, and save your document.
2. Most software: Select **File** from the menu and choose **Print**.  
Office 2007: Click on the Office Button then click on Print.  
Office 2010: Click on the File tab and choose Print
3. Select **Adobe PDF** as your printer.



4. Click on the **Printer Properties** link or the Properties button.
5. Click on **Adobe PDF Settings** tab if it is not on top

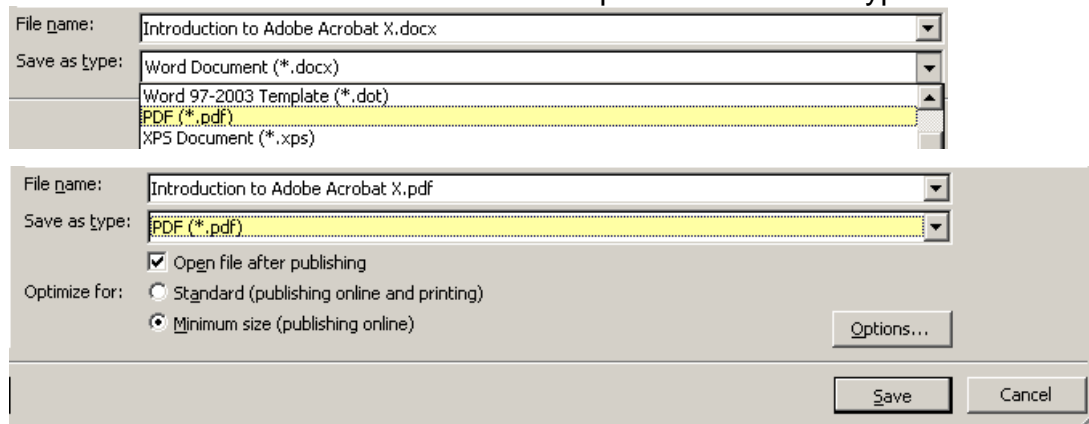


6. Make sure Conversion Settings Default is set to Smallest File Size if you plan to distribute this file from the web or via email. Standard is an all-round good compromise choice.

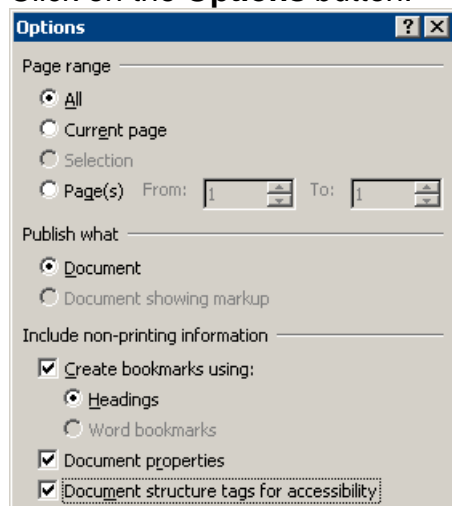
7. Choose "Prompt for filename" if it is not already selected. Prompt for filename allows you to control the location as well as the name of the saved PDF file.
8. Check "View Adobe PDF Results" if it is not already checked. This will open the PDF file in Acrobat as soon as it is created.
9. Click on **OK** to close the settings dialog.
10. Click on the **Print** or OK button to print.
11. Since you have now changed your current printer, verify that your document still appears as you expect. Look at tables, images, and page breaks. Check the page numbers against your table of contents. Make sure you have no blank pages or missing page numbers.
12. If you discover changes that need to be made, make them at this time while the Adobe PDF printer is still your current printer driver. Save your file again. If you made any changes, print again to create a new PDF file.

## Create a PDF File Using Word 2010

**File > Save As >** select PDF from the drop down list for file type:



Click on the **Options** button.

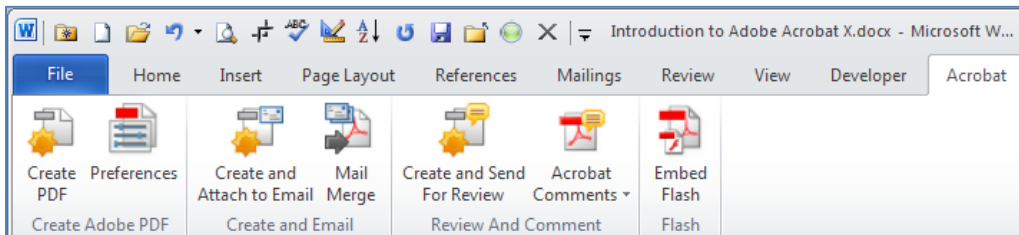


Click on **OK** after you modify your options. Click on **Save**.

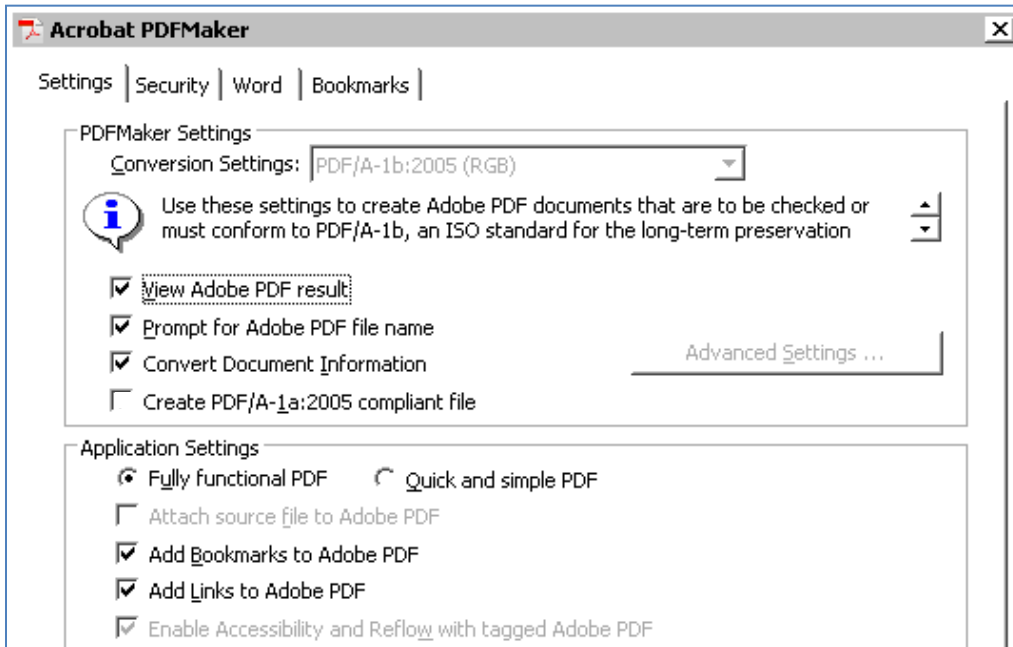


# Using PDFMaker Macro with MS Word 2010

1. Click on the **Acrobat** tab



2. Click on **Preferences**.



3. Choose the appropriate conversion settings for your document's intended use and uncheck any features that you don't have in your document or anything that you don't want converted to corresponding features in the PDF document.
4. Set your Bookmark and Word tab preferences.
5. Click on **OK**.
6. To create the PDF file, click on the **Acrobat** tab → **Create PDF** or click on **File** and choose **Save As Adobe PDF**.

## Import an image file into Acrobat

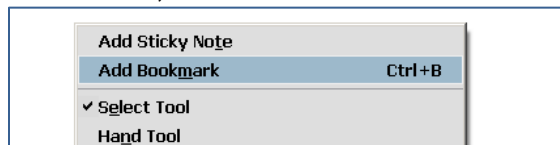
1. Start Adobe Acrobat Professional software.
2. Go to **File > Open**
3. Tell Acrobat to look for all files instead of just pdf files.
4. Browse for and select the graphic file you want. JPEG files' appearance might deteriorate after conversion with default options.
5. Click on **Open**.

# Enhance a PDF file

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## Bookmarks

Bookmarks allow you to supply additional navigation to your document. View the page where you wish to create a bookmark, establish the zoom level, and press **Ctrl B** or right click and choose Add Bookmark from the shortcut menu. Enter a title for the bookmark. If you select text ahead of time with the Text Select tool, that text will be used as the bookmark title.



## Hyperlinks

You can add links to other files or locations to your document. Clicking on a hyperlink will take the reader to a different page in the same PDF file, a different PDF document, or to a web page. The Link tool is in the Content panel under the Tools Pane.

## Document Properties

You can control how the document opens (initial view) and make sure that the document's internal information (meta data such as author, title, keywords, etc.) matches what you want it to be. File > Properties

## Page Numbers

You can make the Acrobat navigation page numbers match the numbering scheme used in your document.

**Tools pane > Document Processing > Number Pages**

## Markup and Annotations

**Comment > Annotations:** Sticky Note, Highlight, Attach File, Record Audio, Stamp

**Comment > Drawing Markups:** Text Box, Callout, Pencil, Line, assorted shapes

## Multimedia

**Tools > Content > Multimedia:** Insert a Video, a Sound file, a Flash file, or a 3D model. Adobe Reader versions 9 and X have a built-in Flash player.

## Optimize

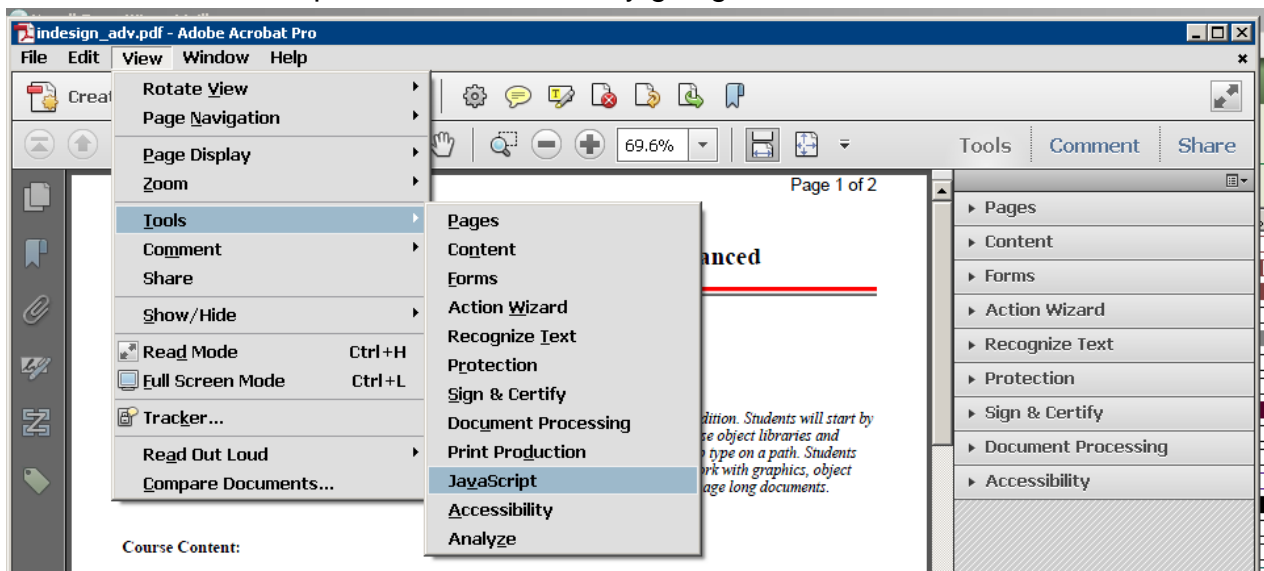
Go to the File menu and select Save As. Save the file with the same or a different name. This newly saved file is now "Optimized" for Fast Web View; this makes the file more easily viewed on the web, especially if the file is large (>4M).

## Security

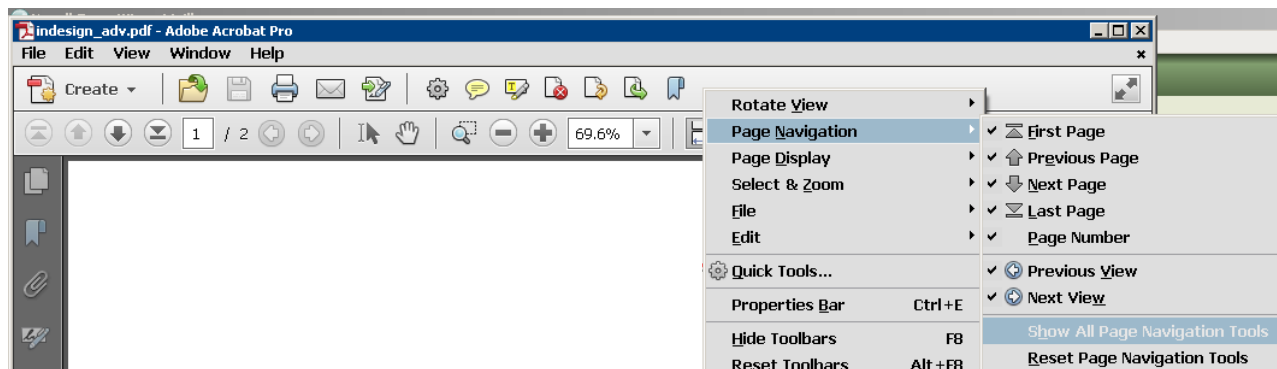
Go to the File menu and select Properties. Click on the Security tab. Select Password Security from the roll down list of security methods. Enter a password to change security settings. You can optionally password protect the document from being opened. You can disallow printing, selecting text, changing the file, and changing annotations.

# Menus, Toolbars, and Panels

Determine which tool panels are available by going to **View > Tools**.



Right click on a toolbar at the top and select the tools you wish to appear in that toolbar



## File Menu

Open | Create | Save | Attach to Email | Action Wizard | Close | Properties | Print | Exit

## Edit Menu

Undo | Redo | Cut | Copy | Paste | Delete | Select All | Snapshot | Check Spelling | Find | Preferences

## View Menu

Rotate View | Page Navigation | Page Display | Zoom | Tools | Comment | Share | Show/Hide ...

## File Toolbar



Open | Save | Print | Share | Get Doc Signed Online

## Page Navigation Toolbar



First Page | Previous Page | Next Page | Last Page | Page Number | Previous View | Next View

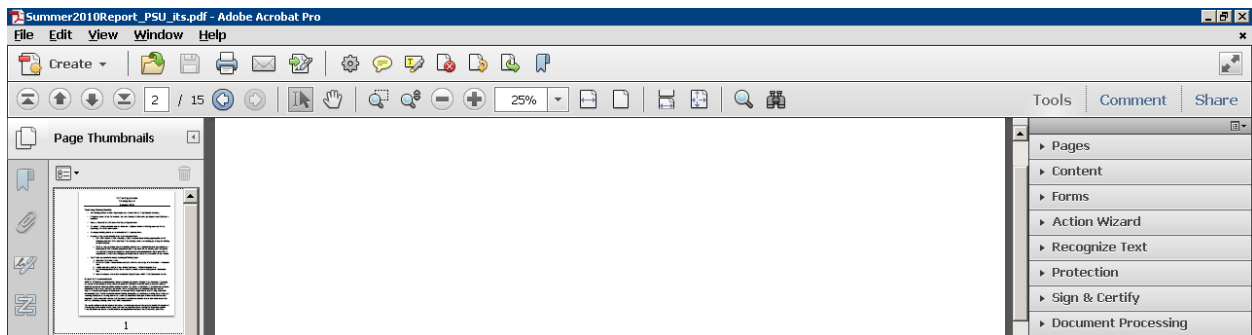
## Select and Zoom Toolbar



- ▶ Select – select paragraphs for copying or for modifying text attributes
- ▶ Hand – move document around on screen, fill out PDF forms on the web
- ▶ Marquee Zoom | Continuous Zoom
- ▶ Zoom Out | Zoom In | Select a percentage
- ▶ Fit Width | Fit Page in window

## Tools Panels

These are on the right. Click on the Show Tools Pane button in the upper right.



### Pages

- Rotate
- Delete
- Extract
- Replace
- Crop
- Split Document

#### Insert Pages

- Insert from File
- More Insert Options

### Content

- Add Bookmark
- Attach a File
- Edit Text & Objects**
- Edit Document Text
- Edit Object
- Add or Edit Text Box

#### Add or Edit Interactive Object

- Link
- Button
- Multimedia
- Select Object

### Document Processing

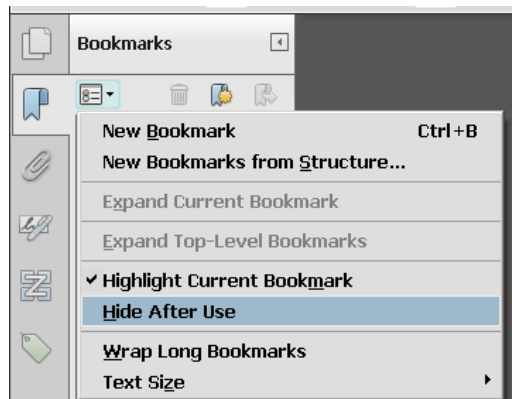
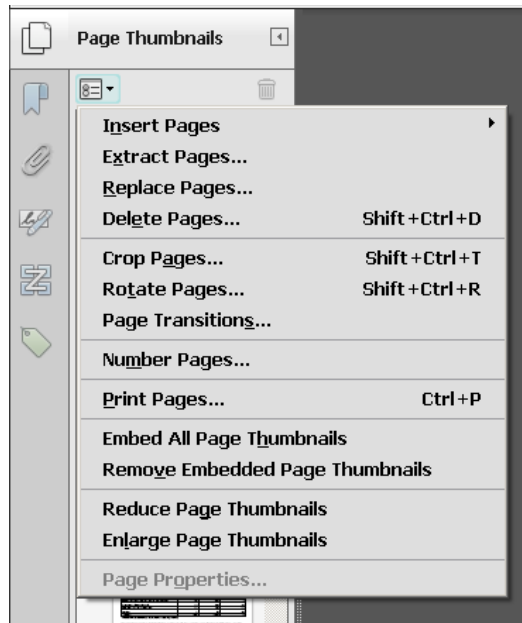
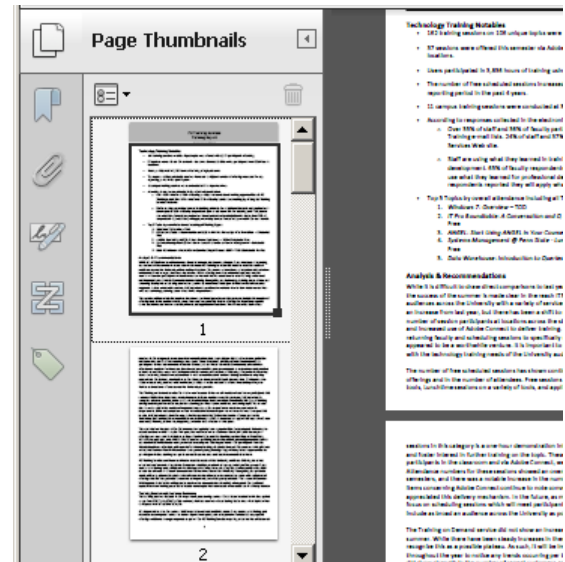
- Optimize Scanned PDF
- Web Capture
- Create Links from URLs
- Remove All Links
- Export All Images
- Number Pages
- Page Templates
- Page Transitions
- Add Article Box
- Full Text Index with Catalog

# Navigation Panels

Adobe Acrobat has a variety of navigation panels, each with a collapsible Navigation Pane along the left side of the program window. If the navigation pane is minimized or closed, you can open it by clicking on any button in the vertical area on the left. **View → Show/Hide → Navigation Panes.**

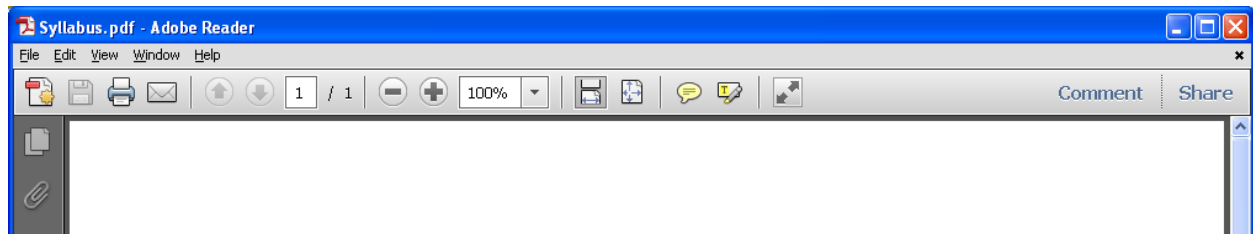
You can use the Page Thumbnails navigation pane to display and rearrange pages in a thumbnail view. Other navigation panes include: Bookmarks, Attachments, Signatures, Content, Order, Tags,

When a navigation panel is open, you can see an **Options** button. Clicking on this button will bring up a menu of choices specific to the navigation pane that is currently active.



# Adobe Reader Tools

The figure below shows the menu, panels, and tools that those who view a copy of your PDF will have available by default when they open it in the free Adobe Reader.



They can add a few more tools to this toolbar or delete tools they don't want:

**View > Show/Hide > Toolbar Items.**

If they are viewing the PDF file in their web browser, the toolbar might look like:



Tools include Print, Save, Attach to Email, Previous Page, Next Page, Select Text, Hand Tool, Marquee Zoom, Zoom in/out tools, Fit Width, Fit in Window, Find

## Zoom in and Zoom out

Click on the plus sign (+) button to zoom in (increase magnification, text appears larger)

Click on the minus sign (-) to zoom out (decrease magnification, text appears smaller)

Use the Marquee Zoom tool to select an area of the PDF page to zoom in on.

You can enter a magnification level or select one from the drop-down list (10% - 6400%)

## Navigation

Click the Previous Page button to view the page preceding the one you're viewing.

Click the Next Page button to see the next page in the document.

If you have the magnification set to **Fit in Window**, you can use the Page Up and Page Down keys on your keyboard to move forward and back one page at a time.

You can press Ctrl Home to go to the first page and Ctrl End to go the last page.

## Find tool

Go to the **Edit** menu and select **Find** or press Ctrl F.

Your cursor will move to the Find box on the toolbar.

Enter text – each time you press the enter key, it will go to that text in the PDF file.

# Bookmarks

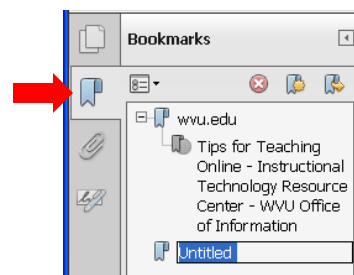
Bookmarks appear in the Navigation Pane along the left side of the document. Click on a bookmark title to go to the bookmarked view. A bookmark can be set to jump to another page within the document, open another PDF file, go to a web page, etc.

## Adding Bookmarks

1. Click on the Bookmarks icon in the Navigation Panel.
2. Go to the page where you want to set a bookmark.
3. Verify the zoom level is what you want it to be
4. Press Ctrl-B on your keyboard  
or right click on the PDF file and choose Add Bookmark
5. Type new text over the *untitled* placeholder and press the enter key

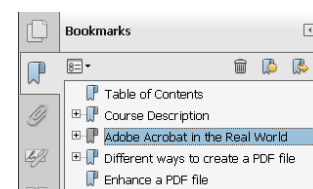
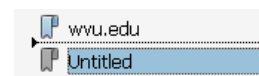
Tip: if you select text in the PDF file with the Select tool before you press Ctrl-B, the selected text will appear as the bookmark title.

6. Test your bookmark: switch to a different page in your document and then click on your bookmark title and verify that your view now displays the correct page.



## Editing Bookmarks

1. Rearrange the order of the bookmarks by clicking on the tiny bookmarked page icon on the left of the bookmark title and dragging and dropping the icon to a new location between two other bookmarks.
2. You can create subordinate bookmarks by dragging until the triangle and dotted line are between the tiny icon and bookmark title before releasing the mouse.
3. Click on the - sign to close up a section of bookmarks; click on the + sign to expand a section of bookmarks.
4. Edit a bookmark title:
  - a. Select the bookmark.
  - b. Click one on the text portion and the entire bookmark text is selected. You can type new text here to replace the entire existing bookmark title.
  - c. Click once more and the cursor will appear on the line of text, allowing you to edit.
5. Delete a bookmark
  - a. Click once on a bookmark page icon to select it.
  - b. Press the Delete key on the keyboard or click on the trashcan icon on the pane.



Modify a bookmark's properties:

Right click on a bookmark's page icon and select **Properties** from the shortcut menu. You can change the bookmark's title appearance, its view zoom level, or its destination.

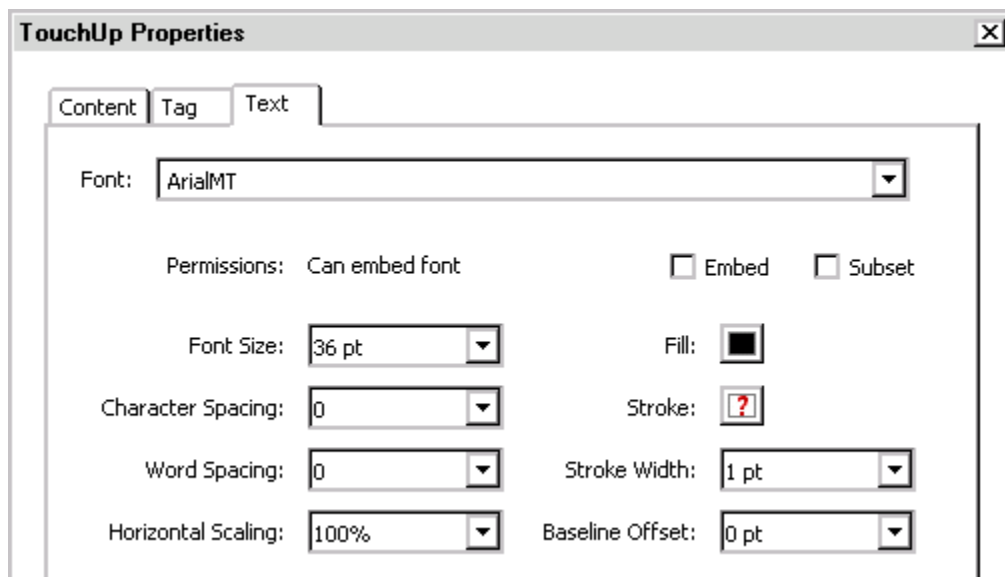
To make bookmarks appear automatically when your document opens:

**File → Properties → Initial View** tab.

Under the list of navigation tab choices, select "Bookmarks Panel and Page." Click OK.

## Changing Text Attributes

1. Click on:  
**Tools → Content → Edit Document Text**
2. Highlight the text you want to change.
3. Right click on the text.
4. Select **Properties** from the shortcut menu.
5. If you get a warning about the font, click on OK.
6. You can change the font, its size, or its color. You can change the spacing between the characters or affect the word's vertical position on the line.
7. You cannot add bold or italics unless there is a font choice with the desired style built in. You cannot add underlining – that has to be done in the original file before conversion.



## Change Text Content

This is useful only for correcting a few errors you notice at the last minute. If you need to make substantial changes, you should edit the original file and create a new PDF file (you can choose to recreate one or more pages, then replace pages)

1. Select the TouchUp Text tool: **Tools → Content → Edit Document Text**.
2. Highlight the character(s) you wish to change and enter new character(s) to replace them. The text will not wrap but you can hit enter (be careful as you might get some unexpected results). You can cut, copy and paste text as usual.

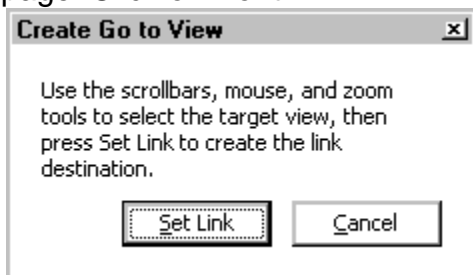
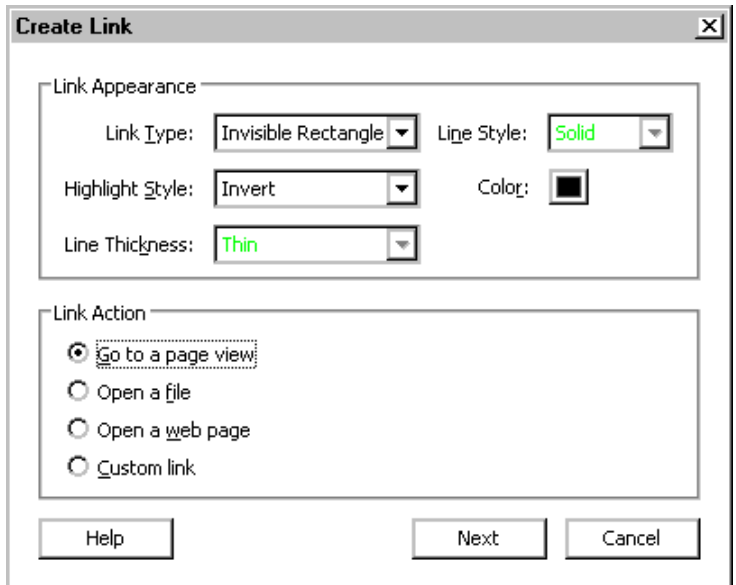


# Hyperlinks

Hyperlinks can appear as a box within the document or they can be invisible. However, a working hyperlink should be apparent when you hover the mouse over a link. Simply click on the hyperlink to activate it. A hyperlink can be configured to jump to another page within the current document, another document, an e-mail address, a web site, etc.

## Adding Hyperlinks

1. Click on the Link tool: **Tools** → **Content** → **Link**.
2. Click on the page and drag to draw a box around the text or graphic that will become the link.
3. Change the Link Appearance:
  - a. If you want different color text, change the text attributes or change it in your original file before converting to PDF.
  - b. Choose whether or not you want to see a rectangle surrounding the link in the PDF file and if so, the line color and thickness.
  - c. Choose what the link will look like while the mouse is clicked down: Invert, Inset, Outline, or no difference.
4. For Link Action, choose “Go to a page view” if you want the link to jump to another page. Click on **Next**.



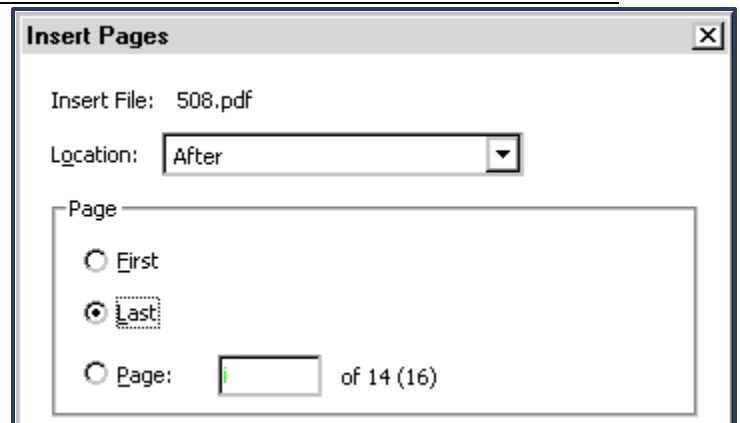
Go to the new location in the PDF file. Click on **Set Link**.

5. To create a link to a web page :
  - a. Complete steps 1-3 above.
  - b. Change the Link Action to **Open a web page**
  - c. Type the complete URL including `http://` into the Address box. Click on the down triangle to select a recently used URL.
  - d. To set the link to an email address, type the full email address preceded by `mailto:` (e.g. <mailto:juser@mail.wvu.edu>.)

# Modifying Document Pages

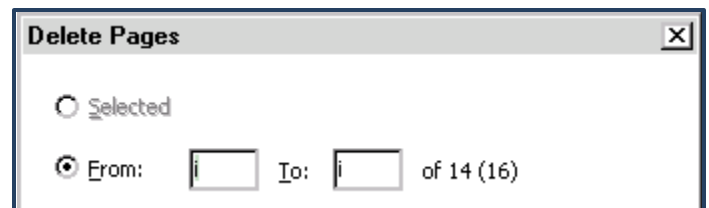
## Insert Pages

1. **Tools → Pages → Insert From File**
2. Select the file you want to insert.
3. Acrobat will prompt you for the location to insert the file into the current document.
4. Click on OK



## Delete Pages

1. Go to the first page you wish to delete
2. **Tools → Pages → Delete**
3. The "Delete Pages" dialog window will specify the page number of the page you are viewing. Make the second number larger if you want to delete consecutive pages. Note that these are physical page numbers, not the ones printed on your document.
4. Click on **OK**.



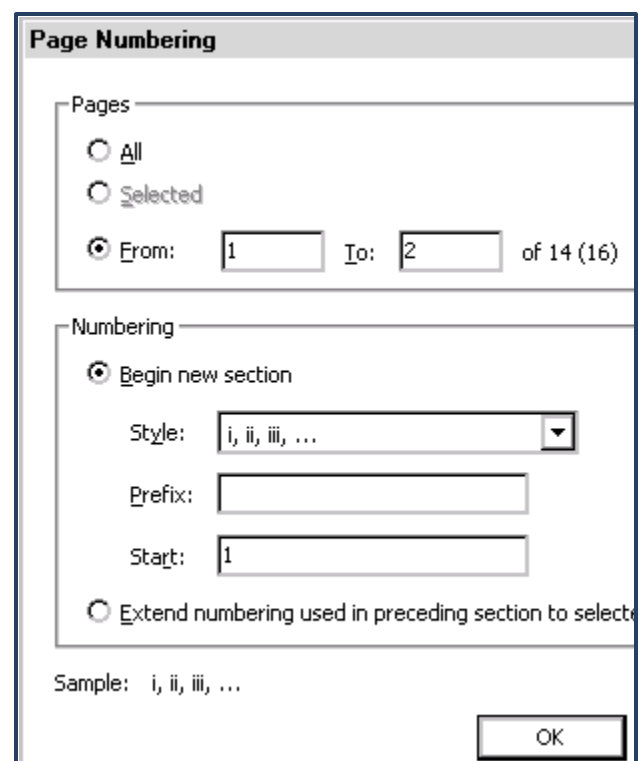
## Renumber Pages

You can force the page numbers in the navigation tool at the bottom to match the ones on the pages.

### 1. **Tools Panel → Document Processing → Number Pages**

2. Specify the pages that should be renumbered.
3. Choose a style
4. Click on **OK**

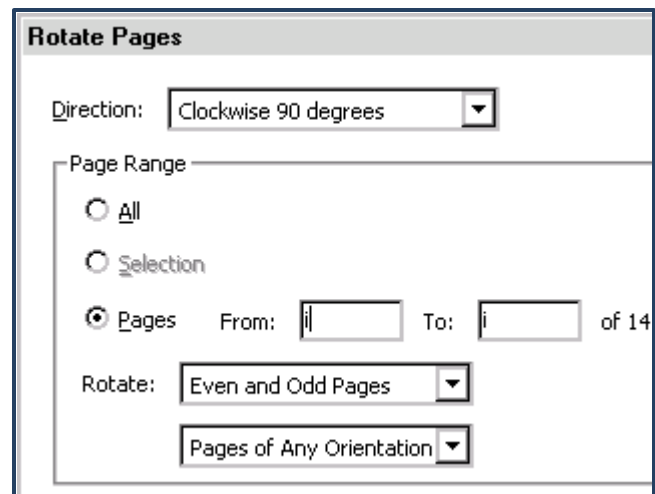
You can have the page numbers at the bottom of your front matter be numbered with roman numerals; then start a new section at the beginning of your body numbered with Arabic numerals, starting at 1 again.



## Rotate Pages

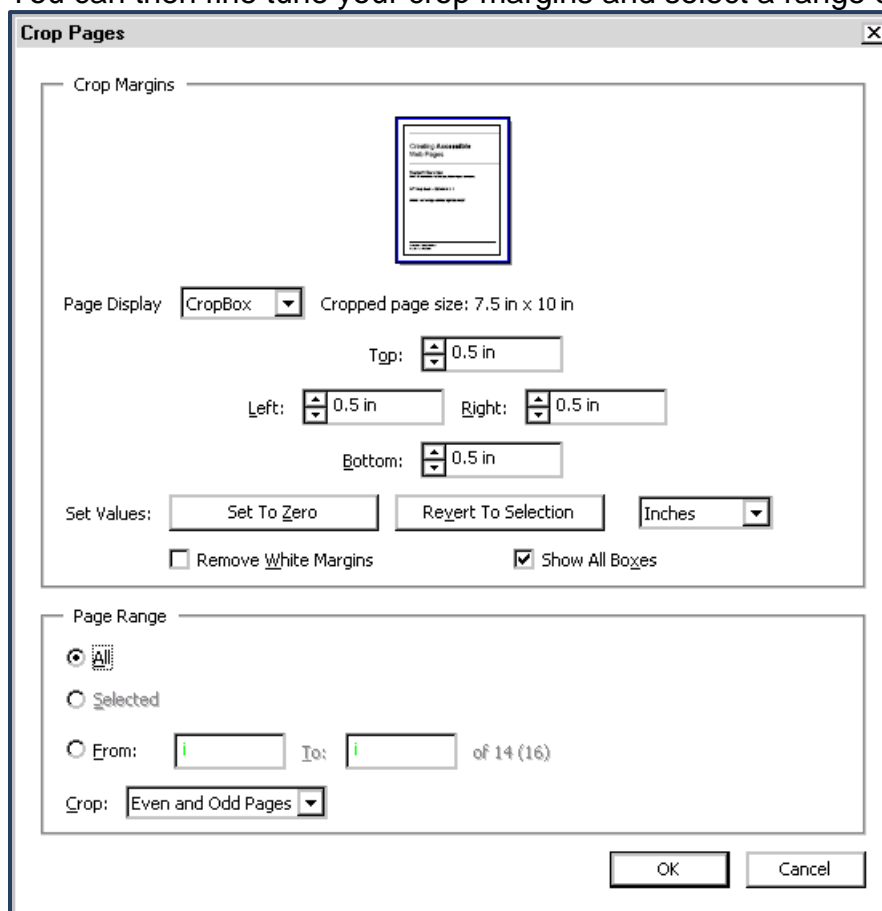
Sometimes you have a page that you need to rotate so your readers don't have to tilt their heads to view it properly.

1. View the page that needs to be rotated.
2. **Tools** → **Pages** → **Rotate**
3. Choose direction: clockwise or counter-clockwise
4. Select the range of pages to be rotated and click on **OK**.



## Crop Pages

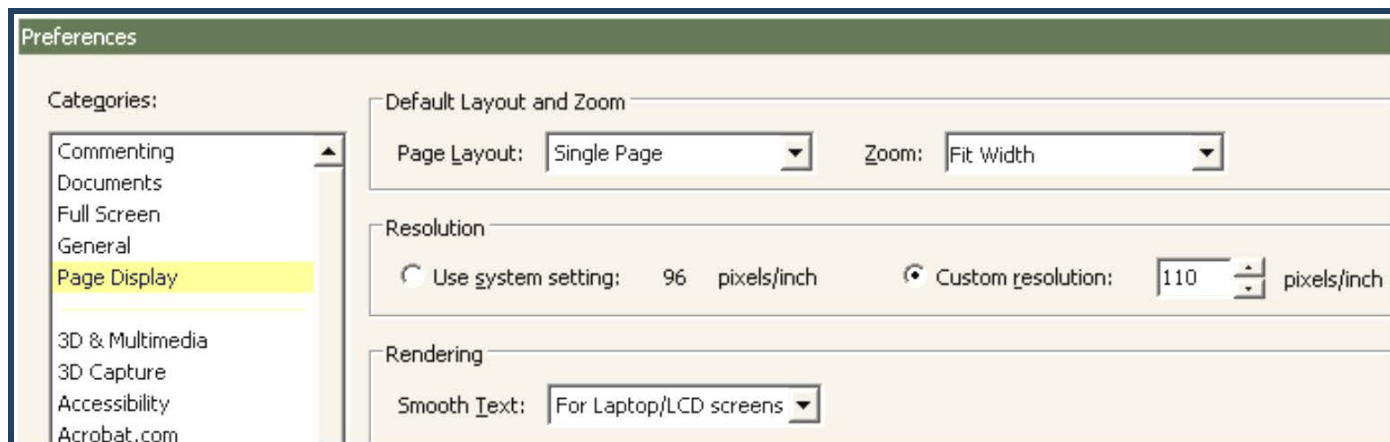
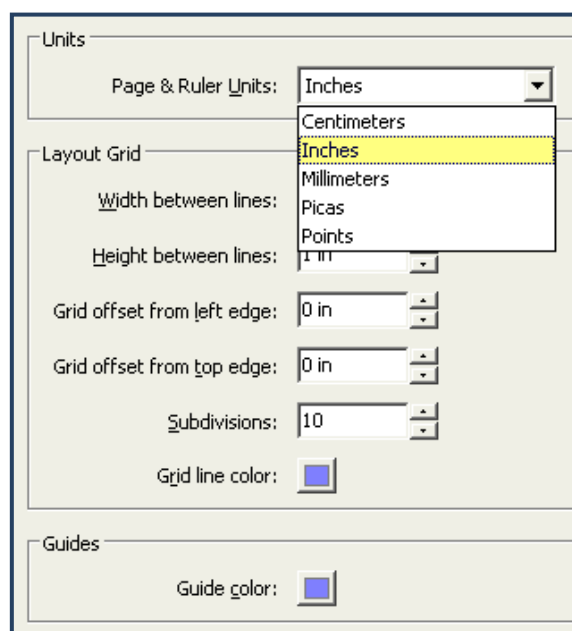
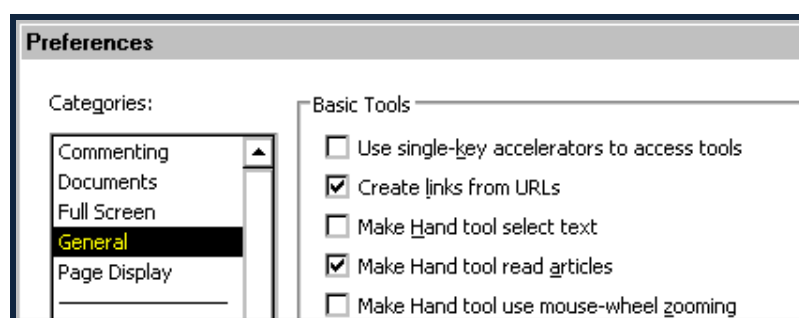
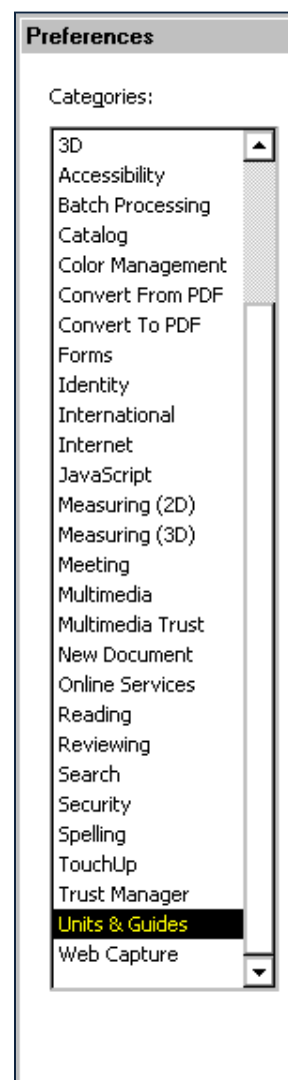
1. View the page that needs to be cropped.
2. Select the **Crop** tool from Tools > Pages and draw a box around the portion of the page you wish to keep.
3. Double click inside the box.
4. You can then fine tune your crop margins and select a range of pages.



5. Click on **OK**.

# Preferences

## Edit → Preferences



## File → Properties

The screenshot shows the 'Document Properties' dialog box with the 'Description' tab selected. The dialog has a title bar with a close button. Below the title bar are tabs for 'Description', 'Security', 'Fonts', 'Initial View', 'Custom', and 'Advanced'. The 'Description' tab contains the following fields:

- File:** Introduction to Adobe Acrobat X.pdf
- Title:** Introduction to Adobe Acrobat Software
- Author:** Application Support and Training; Office of Information Technology; West Virginia University
- Subject:** (empty field)
- Keywords:** PDF, PDFMaker macro, Adobe Reader, Microsoft Word 2010
- Created:** 2/9/2012 9:09:16 PM
- Modified:** 2/9/2012 9:09:22 PM
- Application:** Acrobat PDFMaker 10.1 for Word

There is an 'Additional Metadata...' button to the right of the 'Created' and 'Modified' fields. At the bottom of the dialog are 'Help', 'OK', and 'Cancel' buttons.

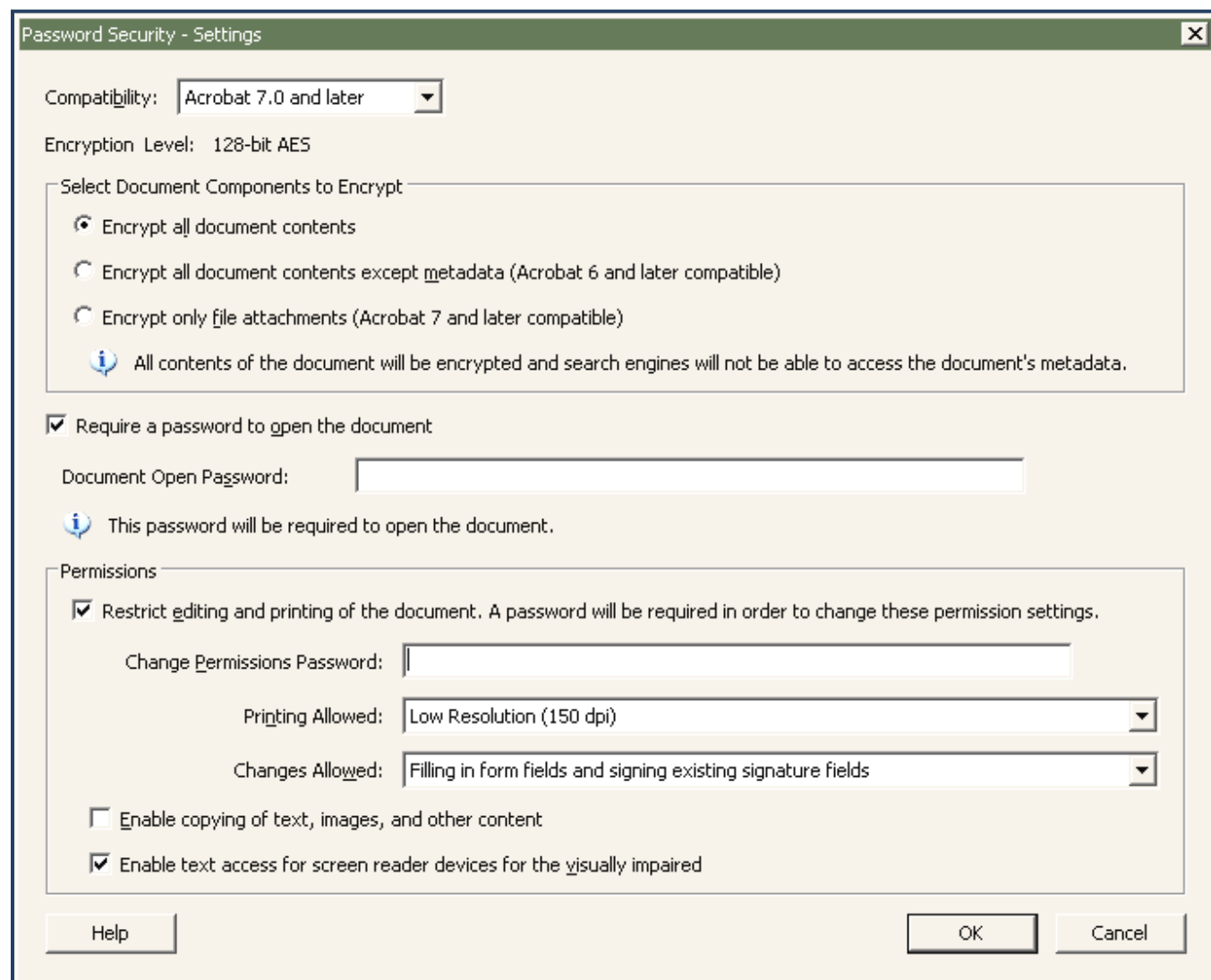
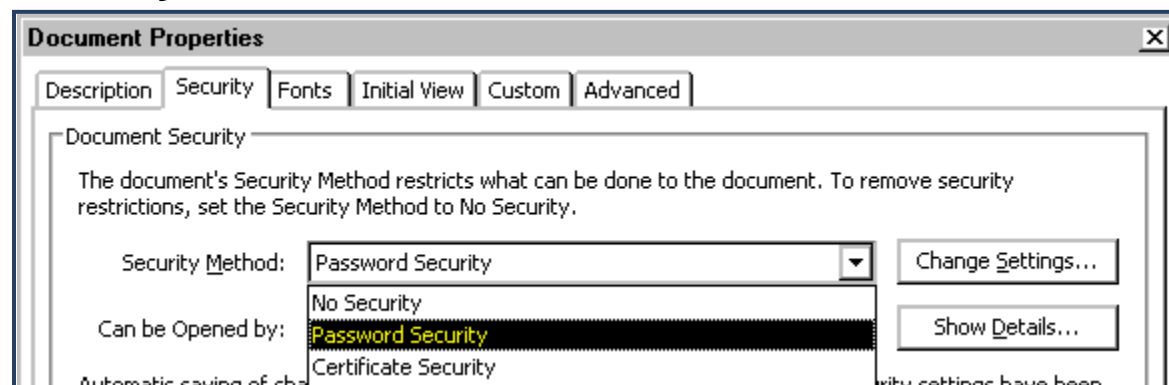
## Initial View tab

The screenshot shows the 'Document Properties' dialog box with the 'Initial View' tab selected. The dialog has the same title bar and tabs as the previous screenshot. The 'Initial View' tab contains the following settings under the 'Layout and Magnification' section:

- Navigation tab:** Bookmarks Panel and Page
- Page layout:** Single Page
- Magnification:** Fit Width
- Open to page:** 1 of 6

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

## Security tab



# Ways to Learn More about Acrobat

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Following are some recommended web sites and books that you may find helpful for learning more about Acrobat:

- Adobe's Web Site: [[www.adobe.com/products/acrobat/](http://www.adobe.com/products/acrobat/)]
  - Adobe Communities: [www.adobe.com/communities/](http://www.adobe.com/communities/)
  - Acrobat User Community: [acrobatusers.com/](http://acrobatusers.com/)
- Lynda.com ([www.lynda.com/](http://www.lynda.com/)) – short-term loaner accounts available from the Office of Information Technology:

Title	Hrs:min	Release Date
Acrobat X Essential Training	08h 59m	11/2010
Acrobat X Tips and Tricks_	04h 33m	09/2011

- PDFzone.com [[www.pdfzone.com/](http://www.pdfzone.com/) ]
- Planet PDF Forum [[forums.planetpdf.com/](http://forums.planetpdf.com/) ]
- ***Adobe Acrobat X Classroom in a Book*** (includes CD with lesson files), Adobe Creative Team, Adobe Press
- ***How to Do Everything: Adobe Acrobat X***, Doug Sahlin, March 2011